Wisconsin ServicePoint

The Wisconsin Exit Assessment

WISP -The WI Exit Assessment

The Wisconsin Exit Assessment is a WISP data collection screen developed by Bureau of Housing staff to help agencies capture essential data elements and information that need to be reported to the U.S. Department of Housing and Urban Development (HUD) or the Wisconsin Bureau of Housing (BOH). The data and information collected may also be important for the management of your agency, for the board of directors or for current or prospective grantors. The WI Entry Assessment and the WI Exit Assessement used together are especially useful for those agencies that wish to have a longitudinal outcome record.

The WI Exit Assessment is found under the Entry/Exit brown button in ClientPoint for all programs/projects EXCEPT those for emergency or transitional **shelter** which do not use this report. *A client profile and a WI Entry Assessment must be completed before a Wisconsin Exit Assessment screen can be completed.*

When you click on the Entry/Exit brown button in ClientPoint, if an Entry record exists the box will show the client name (after the Entry/Exit title in the upper left hand corner) the program that the Entry record was created in, the type of report created (Basic Entry/Exit, HUD 40118, Standard Entry, Quick Call) and the date that the Wisconsin **Entry** Assessment was completed. If you don't see an Entry Assessment record listed here you need to complete one before completing a client **Exit** Assessment screen. Once the Wisconsin Exit Assessment is completed the Exit date will be shown here also. Clicking on the pencil next to the Entry and Exit records allows you to open these records up. Clicking on the trash can next to the program name listed will delete the record.

To create a new WI Exit Assessment, , click on the brown Entry/Exit button, and a new window will open. Click on the pencil under the Exit date for the appropriate assessment (if there is more than one). The WI Exit Assessment screen will then open .
The WI Exit Assessment screen is divided into six main areas that include:

1. The **Overview** section
2. **Household Members If the client is in a Household; otherwise this section does not appear**
3. The main **Exit Data** screen and three sub-assessment screens:
   - **Monthly Income**
   - **Main Stream Resources Received**
   - **Client's Residence**

Overview – The overview.provides a brief summary of the essential data provided in the WI Exit Assessment including: Client Name, Entry Date, Exit Date, Reason for Leaving and Destination. When you first come here only the client name and entry date will be shown. If the client comes from a multi-person household, you will be given an opportunity to include one or more household members in the Exit Assessment you are about to complete. Click on the down arrow and select those household members you wish to include. Click "Add Related Entry/Exit" for each. This is a shortcut to allow you to automatically include other members of a household in an identical exit report at the same time you are preparing the exit report for another member of the same household. If one or more household members are included in this Exit report the persons name with a checkmark next to it will appear below the "Notes" text box in the Exit Data section. If no household members are included in this Exit report the following message will appear below the "Notes" box in the Exit Data section: "No Household members are included in this Entry/Exit". *Optional*

Exit Data

1. **Exit Date:** This is an auto filled date (mm/dd/yyyy) that fills in the current date and time hour: minutes and A.M. or P.M. If necessary, it is possible to change the date and time from the current date and time to the actual exit date and time. *This is expected to be a HUD Required field 2.11*

2. **Reason for Leaving:** This is where your agency will identify the reason why a person served by a homeless program is leaving the program. You can select the most appropriate reason from a picklist provided here. *State requirement*

   2A. **If other, specify:** This space will allow you to type in a reason a client is leaving your homeless program that may not be listed in the picklist. Please note that in reports the text written will not show up, all that will show up is the word, "Other". *Optional*

3. **Destination:** This is where your agency will identify where a persons being served will go to live once they leave the housing your agency is providing. You can select the most appropriate destination from a picklist provided here. *State requirement*

   3A**. If other, specify:** This space will allow your agency to write in a destination if the destination you wish to use is not found on the picklist. . Please note that in reports the text written will not show up, all that will show up is the word, "Other". *Optional*

4. **Notes:** The Notes space provides an opportunity for the agency to indicate other pertinent client exit information that may be helpful in a future case management counseling session, e.g. the current living situation is temporary and the client will be re-locating shortly. *Optional*

6. **Employment Status:** Information on current employment status will help assess clients and identify what type of employment experience and training services a client has received. This information can also help measure outcomes of pre-established employment goals and objectives. Select the best choice from the choices provided in the picklist. **NOTE:** This is the first of many other line items in the Exit screen where you will be able to see a verticle green bar to the left of the data provided and an "H" and a "G". Clicking on the "H" will provide you with a history of previous responses to this question. Clicking on the "G" will provide you with informtion about a case management goal set in conjunction with this question. The green verticle bar indicates the age of the record. *Employment Status is expected to be a HUD Required field 3.11*

   A. **Full-time**: Working a single job 40 or more hours a week will make an employee eligible for overtime at most organizations or businesses so 40 hours is often used as full-time employment status. Less than 40 hours a week at a single job can also be considered full time in some cases. For example, some employers pay their employees during their lunch hour and then 35 hours per week is considered full-time employment.
   B. **Not job ready or employable:** A person is not job ready or employable when they have a physical or mental disability, a significant educational or training deficiency or other similar serious problems that prevent them from getting or holding a job.
   C. **Part-time:** Typically working a single job less than 40 hours a week is defined as part-time employment except in those cases where the employer defines full-time as less than 40 hours a week. Less than 35 hours a week is part time.
   D. **Unemployed-not seeking work:** Is a person who is unemployed and not actively looking for work. That is, they are not filling out applications, interviewing for positions, and otherwise taking specific steps to find work.
   E. **Unemployed-seeking work**: Is a person who is unemployed and actively looking for work.

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7. **Employment Type:** Three choices are offered in this picklist are permanent, seasonal and temporary. If the client is employed or is seeking work select the most appropriate choice. This information can also help measure outcomes of pre-established employment goals and objectives *This is expected to be a HUD Required field 3.11*

A **Permanent**: Are employees who maintain continuous permanent employee status.

B. **Seasonal:** There are no state or federal labor laws for defining seasonal employment status. Typically, seasonal employment is employment for a set period of time (e.g. for six months) or until a certain event occurs (e.g. until a particular project ends) or until work is completed (e.g. until the fruit is picked).

C. **Temporary:** There are no state or federal labor laws for defining temporary employment status. Typically, temporary employees are defined as those employed for a limited duration.

The first of three sub-assessments found in the Exit screen follows. Please note that prior to entering any sub-assessment you must perform a save.

8. **Monthly Income:**. Click on the "Add" button in the upper right hand corner of the sub-assessment box to complete a monthly income assessment. The word "Add" is used because you will be creating or adding an income record. If a person has more than one source of income you can add an income record for each. Once you complete one or more income records, it is possible to show summaries of these records in the Monthly Income sub-assessment box by just clicking "Show Entire List in Window" in the lower right hand corner.

The word, "Income" as it is used here means cash or a cashable item that can be held in the client's hands and that they can use to spend on anything they wish to purchase. Some typical examples of income include wages, child support, alimony, savings bonds and cash gifts. Note: Persons of the same household that are 18 years old or older should be reported separately. Don't add their income into another client's income record . NOTE: Food Stamps are currently listed under "Income" in the HUD 40118 APR even they are not cash or a cashable check, however, they are listed under Mainstream Resources in the proposed data standards. For the present, we will leave them under "Income" however this may change in the near future if the proposed data standards include them under Mainstream Resources.

Contrast the definition of "Income" with the definition of "Mainstream Resources". Mainstream resources do not involve a direct cash or a cashable item that is given to the client. Instead, the client receives "In Kind" services. Some examples of in-kind services include: case management, housing/rent assistance and substance abuse treatment.

A. **Assessment Date:** This is an auto filled date (mm/dd/yyyy) that fills in the date and time that the assessment record was completed.

B. **Last 30 Day Income:** For each source of income, this text box will allow you to insert the client's actual income, or best estimate possible, for the 30-day period prior to coming to your agency. This amount should be rounded up or down to the nearest dollar. Multiple sources of income will require you to complete multiple "Last 30 Day Income" records; one for each source. There is a "Save and Add Another" choice at the bottom of the sub-screen that allows you to create multiple records. *This is expected to be a HUD Required field 3.1*

C. **Source of Income:** Clients should select from the sources of income provided below that best describe the source of the client's income. Multiple records may need to be created if there are multiple sources of income. You can create multiple records by clicking on the gray bar at the bottom of the sub-assessment screen called, "Save and add Another". *This is expected to be a HUD Required 3.1*

D. **Start Date**: This is the date the client first received cash from employment or started receiving a cashable check from a single source such as an alimony check. Provide two digits for the month and day and four digits for the year (mm/dd/yyyy). If the exact date is unknown, just put in a reasonable date – such as the first day of the month when the income started. If there are multiple sources of income, multiple income records will be needed, each with a different start date. This date is also required if this information is to be used with many of the standard reports. NOTE: In order for the income item to appear on the HUD Annual Performance Report (APR) the date field needs to be filled out. *State requirement.*

E. **End Date:** The end date is the last date the client received cash from employment or stopped receiving a cashable check from a single source. Provide two digits for the month and day and four digits for the year (mm/dd/yyyy). If the exact date is unknown, just put in a reasonable date – such as the first day of the month when the income started. When there are multiple sources of income, multiple records should already be created so you can enter end dates for each record. NOTE: In order for the income item to appear on the HUD Annual Performance Report (APR) the date field needs to be filled out. *State requirement.*

9. Mainstream Resources Received: The "Mainstream Resources Received" sub-assessment is found in the Exit Data box after the Monthly Income sub-assessment box. To open it, just click on the "Add" button in the upper right hand corner of the sub-assessment box. The word "add" is used because you will be creating or adding a record. If a person receives more than one in-kind service you can add a mainstream resource record for each. Once you complete one or more mainstream resource records, it is possible to show summaries of these records in the Mainstream Resources Received sub-assessment box by just clicking "Show Entire List in Window" in the lower right hand corner.

"Mainstream Resources" is a term that is often used in reference to a wide variety of social services provided by private service agencies or government offices to homeless and low income persons. The resources provided do not involve direct cash or a cashable check payments to the client, instead they involve what is known as "In Kind" services. Some examples of in-kind services include Food Stamps, Medicare, case management counseling, housing/rent assistance, and substance abuse treatment.

A. Assessment Date: This AutoFill field that automatically fills in the date (mm/dd/yyyy) that fills in the date and time that the assessment record was completed.

B. Mainstream Resources Type: Select the mainstream resources received by the client. If there are multiple mainstream resources received then complete multiple records by clicking on the "Save and Add Another" gray bar at the bottom of the screen. *This is expected to be a HUD Required Field (3.2)*

C. Start Date: This is the date the client started receiving in-kind assistance. Provide two digits for the month and day and four digits for the year (mm/dd/yyyy). . If there is more than one source of in-kind assistance, then provide a start date for each record created. For services, this date may represent either the first day a service was provided, or the first date of a period of continuous service. For example, if a person receives daily counseling as part of an ongoing treatment program, the first date of service is the date of enrollment in the treatment program. NOTE: Should a person leave a continuous program and then return to that program one day or more after the last date of utilization this new visit must be recorded as a new entry date. NOTE: In order for the resource item to appear on the HUD Annual Performance Report (APR) the date field needs to be filled out. *This is expected to be a HUD Required Field (3.2).*

D. End Date: This is the date a client stopped receiving in-kind assistance. Provide two digits for the month and day and four digits for the year (mm/dd/yyyy). If there is more than one source of in-kind assistance then provide an end date for each record created. This date may represent then last day a service was provided or the last date of a period of continuous service. For example, this could be the last day a person receives food stamps or, if a person is receiving daily counseling as part of an ongoing treatment program and then either formally terminates the counseling sessions, or fails to return for counseling, the end date would be the last date of counseling. NOTE: If a client stops utilizing a continuous program for one day or more, the last day of utilization must be recorded as the service end date. In order for the resource item to appear on the HUD Annual Performance Report (APR) the date field needs to be filled out.*This is expected to be a HUD Required Field (3.2)*

10. **Client's Residence:** The "Client's Residence" sub-assessment is the last box in the Exit Data screen. To open it, just click on the "Add" button in the upper right hand corner of the sub-assessment box. The word "add" is used because you will be creating or adding a record. If a person has more than one residence you can add a residence record for each location. Once you complete one or more resident records, it is possible to show summaries of these records in the Client's Residence sub-assessment box by just clicking "Show Entire List in Window" in the lower right hand corner.

"Client's Residence" is a term that is often used in reference to information on a client's current residence, if living in a house or an apartment or a mobile home.

A. **County of Residence:** A picklist of all the counties in the State of Wisconsin is provided. Select the client's county of residence where they will be living when they leave your agency's program. If the client plans to live in a county outside of Wisconsin . Cook County and Lake County in Illinois are listed, otherwise use "Out of state—Other"*State requirement*

B. **Client's Street Address:** This is a textbox where you insert the street name, house number or building number of your client's residence where they will be living when they leave your program. *State requirement*

C. **Client's Apartment Number:** A text box where you can insert the client's apartment number where they will be living when they leave your program. If their new residence is not an apartment skip this field.. *State requirement*

D. **Client's City:** This is a picklist of all Wisconsin cities, villages, and towns. Select the city, village or town where the client's new residence is located. If it is out of state, leave this field blank.. *State requirement*

E. **Client's State:** This is a picklist of all states. Select the State of client's next residence. *State requirement.*

F. **Client's ZIP:** This is a text box where you can insert the federal zip code for the client's next residence. *This is expected to be a HUD Required Field (2.8).*

G. **Permanent Residence:** A "yes" or "no" question. Select "yes" if the client considers their next residence permanent and "no" if it is not a permanent residence. *State requirement.*

H**. Residence Start Date:** The date the client will start living in their next residence. Provide two digits each for the month and day and four digits for the year (mm/dd/yyyy). In the case of a shelter visit, this date would represent the first day of residence in a shelter following residence outside of the shelter, or residence in a different shelter. For example, the first date of service may be the date a person is admitted into a shelter, after residing in an abandoned building or with relatives the night before. It may also represent the first date of residence in a transitional housing unit or a permanent housing unit after transferring from an emergency shelter. *This is expected to be a HUD Required Field (2.7).*

I. **Residence End Date:** Unless this date is known for some reason, just insert the word "unknown" here.

J. **Reason for leaving this Residence:** Ignore this question and do not select anything. *State requirement*.

K**. Home Phone Number:** Area code plus telephone number for next place of residence. If no residence based telephone will be used, show a cell phone number, if a cell phone will be used. *Optional*